Making Information Management and MEL work at a global level

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Outline

1. About IREX
2. Global MEL strategy and vision
3. Information Management & IREX Global MEL
4. Information management system rollout
About IREX

IREX is a global development and education organization that builds more just, prosperous, and inclusive societies around the world.

600 staff worldwide
Partners in 100 countries
Mission & Areas of Work

Engage and empower **YOUTH**

Cultivate **LEADERS** at all levels of society

Strengthen education, civic, and governing **INSTITUTIONS**

Extend access to **QUALITY EDUCATION and INFORMATION**
Global MEL strategy and vision
The challenge

- Global presence, diverse program areas, range of sizes and funding sources
- Diverse data and learning needs across the organization
- Range in MEL capacity and resources at the program level
- No clear one-size-fits-all data management system
From **Global Indicators** to **Strategic Evaluation and Learning (SEL)**

- **2016**: IREX Global indicators developed
  - Salesforce database launched
- **2018-19**: Internal review
- **2020**: IREX 2025 strategy launched
  - New database system research
  - Launch of new Strategic Evaluation & Learning (SEL) approach
- **2020-21**: ActivityInfo pilot and program reporting
- **2023**: SEL system strengthening
Multi-level approach to SEL (or Global MEL)

Track progress towards Strategy targets

Evaluation studies for 2025 Strategy outcomes

Evaluation & Learning agendas per Practice and Approach area

Program MERL standards, MEL community building, MEL capacity building

2025 Strategy Outcome targets

IREX Strategy Evaluation Studies

Program practice & Approach area learning

Program MEL
A Whole System Approach is needed

Program Startup
Human and tech resources mobilized

Technology infrastructure
Data collection, management, reporting

Proposals
Incorporate MEL standards and IREX

Processes & standards
collection, analysis, reporting, learning

IREX SEL System

Close-out
All data & learning captured
The vision

✓ Connect program-level MEL results to global strategy and impact
✓ Greater ability to query program data for cross-program learning
✓ Cross-program learning about hard-to-measure outcomes
✓ Raise quality of MEL across programs with MEL standards, technical assistance
✓ Build a culture of learning, and data-informed decision-making
Information Management &
IREX Global MEL/SEL
ActivityInfo Pilot

2021 pilot with a small subset of programs and indicator data

2020-2021

• ~10 users active on ActivityInfo
• Small group pilot ActivityInfo forms
• Indicator data from ~30 programs uploaded
• Program indicators coded to IREX 2025 strategy outcomes
• Beta annual report and dashboard
ActivityInfo Scale-up

2022 ActivityInfo rolled out across all IREX programs

2021 – 2022

• 100+ IREX staff with user accounts
• 65 programs with uploaded indicators and indicator results
• 9 programs using ActivityInfo for other MEL data
• New requirements: Standard IREX reach indicators, disaggregation, and tags (L2D, GESI, F-indicator tags)
ActivityInfo Institutionalization

2022-23 ActivityInfo across all IREX programs

+ Program adoption
+ Data consolidation
+ Data access and use
+ Technical support
+ Data quality
+ Learning from data
+ Data consolidation

Consolidate quarterly indicator and quarterly narrative reporting in ActivityInfo

Moving internal quarterly reports in Word to ActivityInfo form
+ support to programs
Invest in database technical support across the organization

✓ ActivityInfo technical support + support packages (onboarding + ‘customer success’)

<table>
<thead>
<tr>
<th>ActivityInfo for <strong>Global MEL Strategy</strong></th>
<th>ActivityInfo for <strong>Program MEL</strong></th>
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<tbody>
<tr>
<td>1. Strategy and implementation lead</td>
<td>1. Dedicated “Data and Learning Specialist”: helps design program MEL databases and migrate data</td>
</tr>
<tr>
<td>2. Data entry support lead: trains and mentors MEL liaisons</td>
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<tr>
<td>3. Practice area MEL liaisons: program specific support and training</td>
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+ data quality
Rollout of MEL policies, standards, and guidance with new MEL handbook

✓ New MEL Handbook roll-out
✓ Data reporting and quality dashboard tracker
✓ New Practice MEL liaisons
+ data access and use

✓ Interactive dashboards using PowerBI

✓ New tags for indicators to help quickly filter data
+ data for learning and action

✓ Annual 2025 Strategic Plan Report
✓ Strategic Plan Outcome evaluation studies
✓ Practice and Approach area ‘deep dives’
✓ Custom program dashboards for indicator tracking
Rollout of ActivityInfo to programs
### ActivityInfo integration across the data value chain

Integration of data collection, process, analysis, reporting with ActivityInfo is mixed across IREX

<table>
<thead>
<tr>
<th>Integration steps for Global MEL (indicators) &amp; Program-specific MEL</th>
<th>Integration with ActivityInfo (low, med, high)</th>
<th>notes</th>
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</thead>
<tbody>
<tr>
<td>Raw data collection via ActivityInfo forms</td>
<td>Low</td>
<td>Preference for other tools</td>
</tr>
<tr>
<td>Entering/importing all indicator data in ActivityInfo</td>
<td>High</td>
<td>Quarterly reporting of indicators in database</td>
</tr>
<tr>
<td>Data processing, coding, and analysis of <strong>indicator</strong> data</td>
<td>Med</td>
<td>Coding in database but analysis with other tools</td>
</tr>
<tr>
<td>Reports and dashboards for indicator data</td>
<td>Low</td>
<td>Mostly in PowerBi and Word</td>
</tr>
<tr>
<td>Program MEL data in ActivityInfo (beyond indicators)</td>
<td>Low/med</td>
<td>Early adopters + new programs</td>
</tr>
<tr>
<td>Data processing, coding, and analysis of <strong>program</strong> MEL</td>
<td>Low</td>
<td>Early adopters only</td>
</tr>
</tbody>
</table>
Program-level MEL and Activity Info

8 programs are currently using Activity Info for MEL in different ways:

1. Pre- and post-test analysis
2. Tracking and analyzing training participant data
3. MEL indicator data collection and management
   • Data Centralization
   • Data Analytics and Visualization
Onboarding steps for new programs

To onboard new programs into ActivityInfo we go over the following steps;

1. ActivityInfo **orientation call**
2. Create a **dummy database**
3. **Database design**
4. **Pilot the tool before data collection.**
5. **Train the team on database management practices**
6. **Provide any additional support** when required.
Onboarding Steps for **Existing Programs**

To onboard already existing programs into ActivityInfo we go over the following steps:

1. ActivityInfo **orientation call**
2. **Draft the data Migration plan**
3. **Database design**
4. **Data Validation**
5. Train the team on **database management practices**.
6. Hand over the migration plan to the team and provide any **additional support** when required.
Example 1: SIMS II
Example 2: Youth Excel
## Challenges and Lessons: organizational change process

<table>
<thead>
<tr>
<th>Challenge or pain point</th>
<th>Response</th>
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<tr>
<td>Adoption</td>
<td>Involving users in the design process; Allowing for flexibility in database adoption; providing ongoing support to program teams.</td>
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### Best Practices

<p>| Reference Resources | Preparing training and Webinars; Using ActivityInfos’ online resource library. |</p>
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<td>Process inefficiencies</td>
<td>Streamline process of adding and managing users; close/archive ended programs; help desk ticketing; automate workflows</td>
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<tr>
<td>Interoperability between ActivityInfo and other IREX tech platforms</td>
<td>Merge data from different sources in PowerBi, standardize fields and practices</td>
</tr>
<tr>
<td>Databases within ActivityInfo not connected</td>
<td>R script or other custom fix</td>
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